

Protocol for Planning Project Hand-offs

Objective

At the time of Planning application submittal, a project manager is assigned to review the project, facilitate the resolution of project issues, coordinate with city departments and other agencies, and manage the project schedule. The City strives to maintain one project manager for an application. However, there is an occasional need to re-assign an application to a new project manager. In such an event, the purpose of this protocol is to facilitate a seamless transition to:

1. Maintain strong communication between the project manager and applicant,
2. Establish consistent project review between the outgoing and incoming project managers,
3. Minimize impacts to previously established project schedules, and
4. Ensure that the City's delivery of good customer service is not interrupted.

Process

The protocol for project hand-offs is as follows. Days listed are in working days and do not include City holidays or closures.

Transition	Planning Staff Task
Days 1-3	<ol style="list-style-type: none"> 1. Management staff officially announces the transition of the current project manager to their new role. 2. Management staff identifies the new project manager to assume the application from outgoing project manager.
Days 4-9	<ol style="list-style-type: none"> 1. Outgoing project manager meets with the new project manager and new project manager's senior planner to hand-off project and comprehensively review: <ol style="list-style-type: none"> a. Project's scope of work, b. Initial project issues identified in the 30-day comment letter, c. Project status and identify outstanding issues, d. Environmental clearance status, e. Public outreach status, f. Internal coordination with other departments, and g. Anticipated project timeline. 2. Proactively contact applicant to introduce new project manager, and identify project status and next steps. <ol style="list-style-type: none"> a. For projects with inactivity on applicant's part for 6 months or greater: Send e-mail identifying new project manager. b. For active, less complex projects: Conference call with project applicant, outgoing project manager and new project manager. Send follow-up e-mail identifying new project manager's contact information and, for reference, senior planner's contact information. c. For active, more complex projects: Schedule meeting with applicant, outgoing project manager, new project manager, and new senior planner. Send follow-up e-mail identifying new project manager's contact information and, for reference, senior planner's contact information.

Once the new project manager is introduced to the applicant, this project manager will be the main contact for the continued processing of the project application.